

2018 WORLD CUP INSIGHTS

Awareness, Interest
& Viewing Habits of
African fans

By GeoPoll



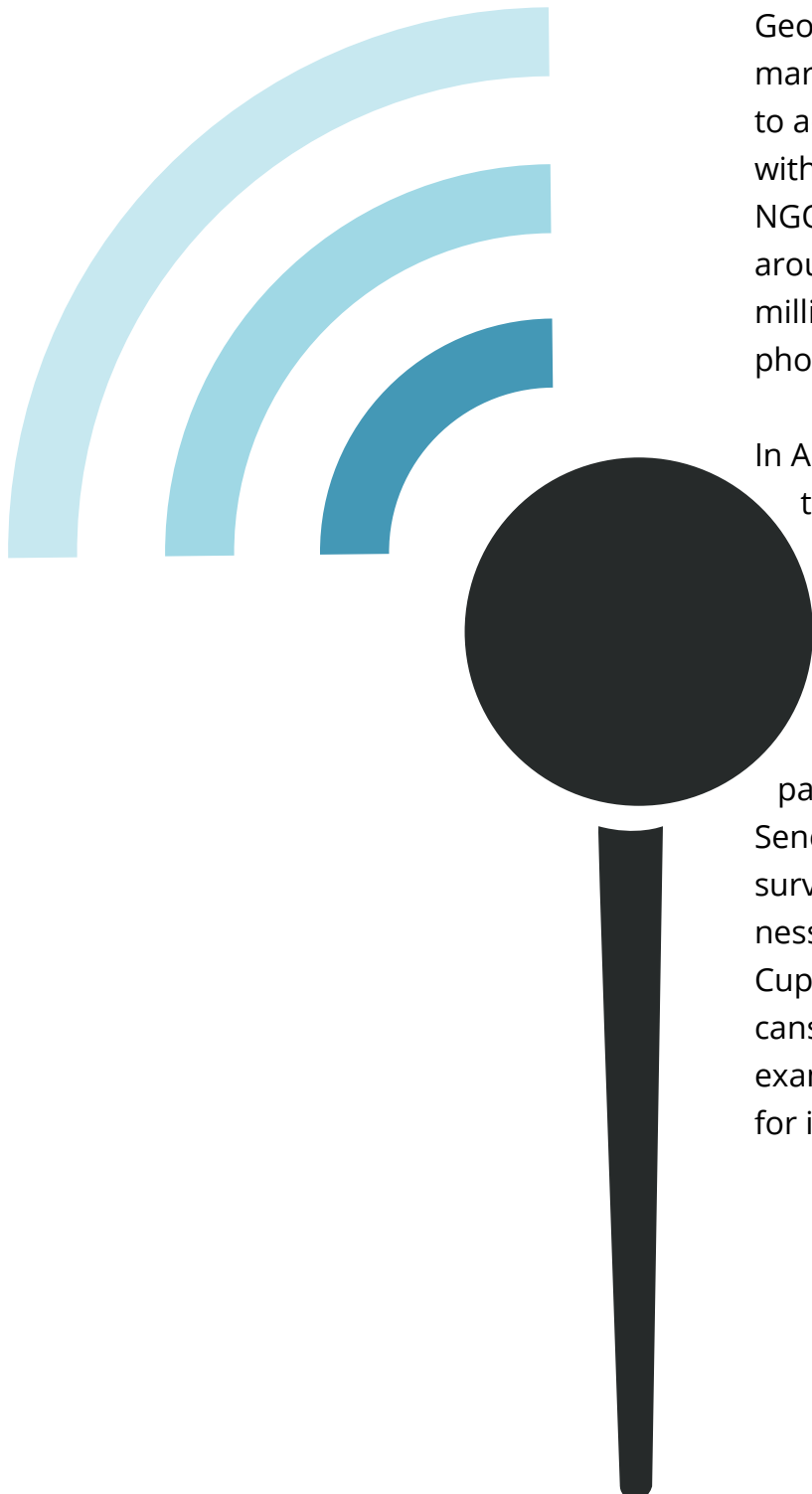
2018 World Cup:

Awareness, Interest & Viewing habits
of African fans

Table of Contents

About This Report	3
Foreword	4
GeoPoll's 2014 World Cup	6
2018 World Cup Survey Report	7
Awareness	8
Interest	10
Advertising Awareness	12
Predictions and Favorite teams.....	13
Viewing Habits	16
Gender Trends	17
Conclusion	18
Survey Methodology	19
About GeoPoll	20
Contact Information	21

ABOUT THIS REPORT



GeoPoll is a leader in providing affordable market research from areas that are difficult to access using traditional methods. Working with global brands, media houses, and NGOs, GeoPoll facilitates data collection around the world and completes over 7 million surveys per year through the mobile phone.

In April 2018, GeoPoll conducted a survey on the upcoming 2018 FIFA World Cup to gauge interest and awareness of the 2018 extravaganza in Africa. The multi-country survey was conducted among 2,400 unique respondents from GeoPoll's active respondent panels in South Africa, Ghana, Nigeria, Kenya, Senegal and Tanzania. The objectives of this survey were to determine the level of awareness and interest in the upcoming World Cup, predict viewership habits among Africans towards for the World Cup games, and examine which teams Africans are rooting for in 2018.

FOREWORD



Millions in Africa tune in every week to watch the stars of the world's biggest football clubs compete. It is difficult to find an office, restaurant or bar on the continent that is not broadcasting some sort of football game at any given time. This was demonstrated by the high level of viewership for the UEFA Champions League final in May 2015, which had around 20 million African viewers according to GeoPoll's overnight audience measurement service. The service currently runs in 11 countries

The FIFA World Cup was first held in 1930 - with the first TV broadcast recording taking place in the 1954 edifice held in Switzerland - appealing mainly to the European and South American audiences.

According to FIFA's milestones, Facts & Figures report, Statistical Kit 7 report, In 1966, the event held in England, marked the first truly global TV broadcast. Since then, it has grown in popularity around the world. Now a greater percentage of the global population has access to televisions, radios, and the internet with which they can follow the tournaments.

The *Global Interest in Football* report by Nielsen published in 2014 notes that, "nearly half of the people in the world are interested in football and one fifth of them actually participate in the sport." The report further states that "the countries with the highest levels of interest and participation in football are in Africa, Asia and the Middle East", and in Africa, football is undoubtedly the most popular sport.

According to figures from FIFA and Kantar Media, in 2014, the FIFA World Cup reached a global in-home television audience of 3.2 billion people. In Africa, at peak viewership during the Nigeria/Iran game, there were about 25 million Africans across 5 countries in Africa including Ghana, Kenya, Nigeria, Tanzania and Uganda that were watching the games.

In 2014, GeoPoll offered data insights on viewership of the World Cup - a first in Africa on media and audience measurement services. The surveys provided daily viewership numbers on African football fans. These viewing habits among Africans gave credence to what has long been suspected - fans on the continent are crazy about football.

Four years on, there has been proliferation of low cost mobile phones. This has seen tremendous growth in reach for both TV and radio content. Internet penetration due to these phones has culminated in wider reach of the game in Africa.

With access to data-enabled smartphones, African football fans can now keep up with all the news and information about their favorite teams and players. Affordable connectivity and social media has bridged the distance between teams and their fan bases. This has enabled them to follow and interact with their sports idols like never before.

Mobile phone usage has also changed how fans interact with football by simplifying gambling and payment modes. Football betting and the popularity of English football leagues continue to grow in a symbiotic way with a growing youth population that continues to be defined by its uptake of technology, *a straw poll we carried out in March 2017 confirmed.*

With the 2018 World Cup slightly over a month away, what is the current state and depth of awareness among African football fans about this global sporting event? How many people are aware of the brand activations happening from brand owners hoping to push their various products and services to this captive audience? GeoPoll's report explores this in depth, looking at viewership habits by location, the camaraderie and the strong nationalistic spirit that this spectacle is known to bring.

We hope that this report will provide some insights into the awareness, interest and expected viewing habits of Africans during

the 2018 World Cup. To learn more about these results or commission a study of your own, *please contact us here*. GeoPoll will also be collecting daily audience measurement data that will provide insights on viewership of games, and audience share of non-World Cup channels, so that advertisers can measure their impact among their target audience throughout the World Cup. To subscribe to GeoPoll's daily TV, radio, and print ratings during the World Cup, *contact us here*.

GEO POLL'S 2014 WORLD CUP INSIGHTS

In 2014 GeoPoll collected regular data insights on the 2014 World Cup, based on our audience measurement service and various surveys that we ran before, during and after the World Cup games. Data was collected among respondents in Ghana, Nigeria, Uganda, Kenya, and Tanzania. It demonstrated viewership of games as well as predictions from Africans on who would win the World Cup, and information on their team preferences.

Findings included the following:



Out of 10 African nations polled, 36% thought Brazil would win the World Cup, followed by Germany at 11%.

At peak viewership, during the Nigeria/Iran game, about 15% of all adults aged 15+, or 25 million total across Ghana, Kenya, Nigeria, Tanzania and Uganda, were tuned in.

The second most watched game also involved an African team, Ghana, when 24.5 million tuned in to watch their loss to Germany.

Across all 5 nations, the first semifinal was viewed by 22.5 million, while the second was viewed by 18.4 million.

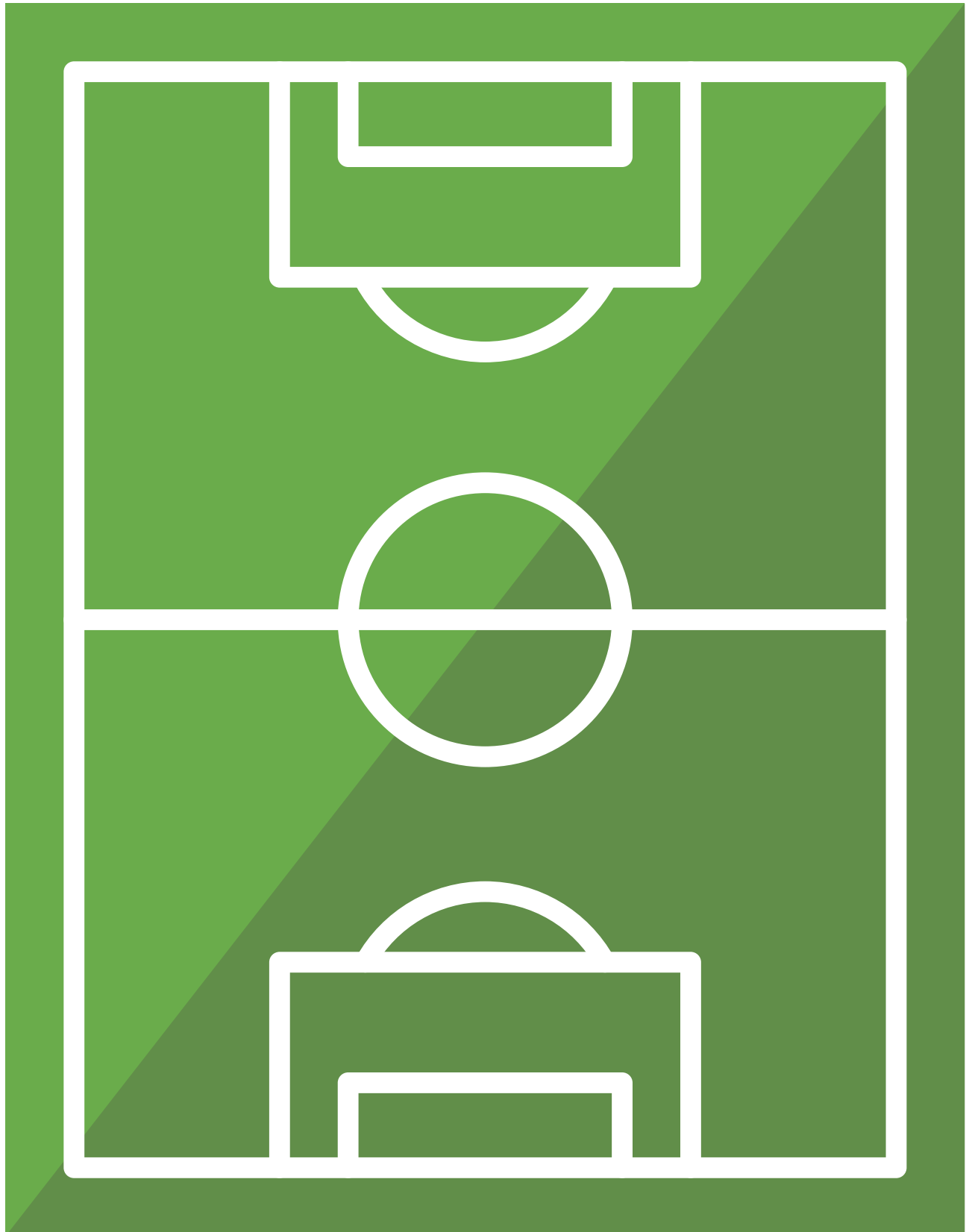
Germany had high viewership throughout, partly due to their strong standing in the tournament, and because they played two African teams: Ghana and Algeria.

Brazil was also a popular team to watch: 24.9 million tuned in to their match against Chile.

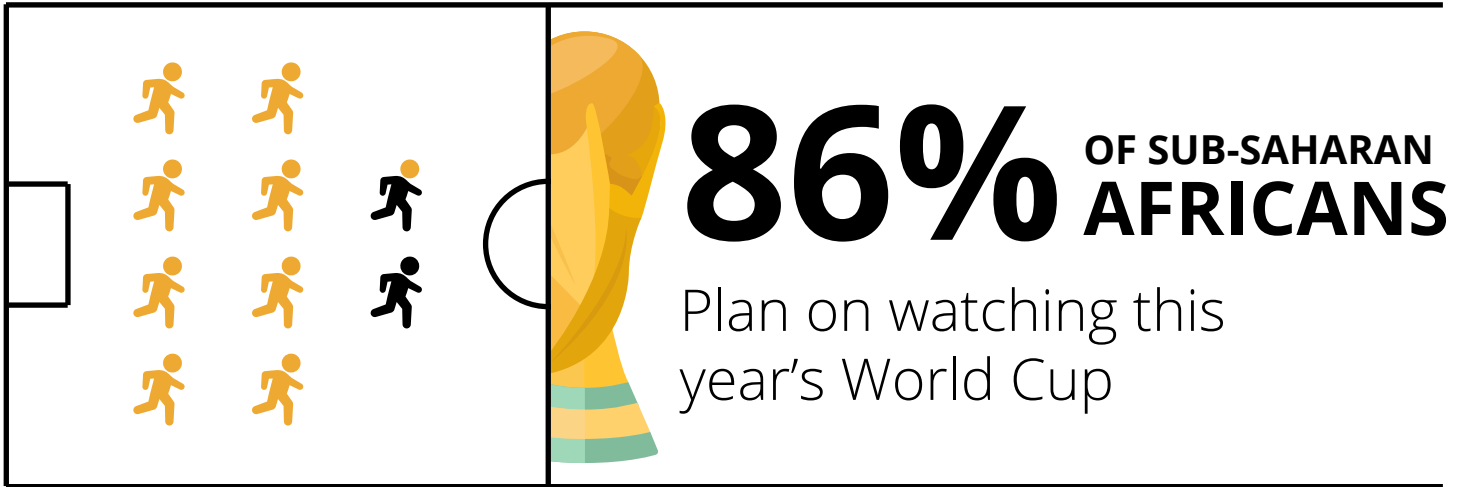
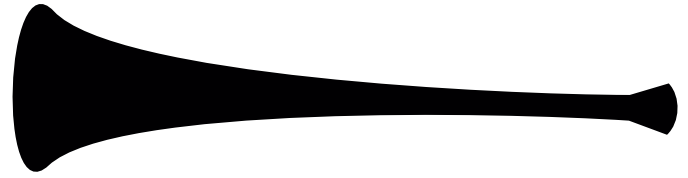
In general, GeoPoll found that more males watched the games than females: Across all games and countries through the Round of 16, the gender split was 67% male to 33% female.

While males consistently tuned in to all games, females tuned in most to games involving African teams.

2018 WORLD CUP SURVEY RESULTS



AWARENESS

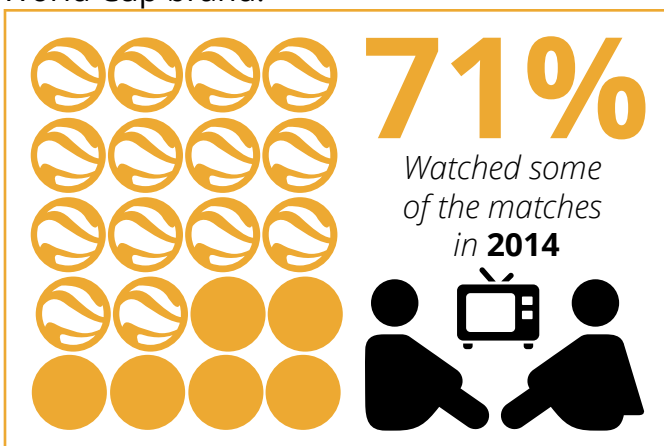


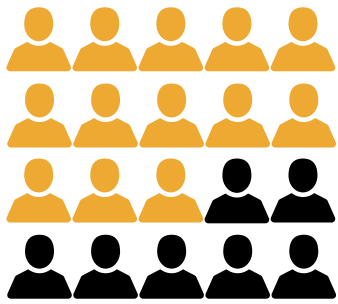
The World Cup has a tendency to garner awareness and interest from those who are normally not football fans, and GeoPoll's survey confirms this assertion. Eighty six percent of Africans across South Africa, Ghana, Nigeria, Kenya, Senegal and Tanzania plan on watching this year's World Cup, which will be played from 14th June until 15th July in Russia. Out of those who plan on watching this year's games, 71% watched some of the matches in 2014, demonstrating the high level of interest in the tournament and the strength of the World Cup brand.

With two months before the start of the games, the survey found that a majority of Africans surveyed are aware of when the World Cup is starting.



An equally big number of respondents were aware of which TV channels in their respective countries will be carrying live broadcasts of the matches. Sixty two percent of respondents were aware that the event will be taking place this year, with a further 68% picking June as the month the games would be kicking off.



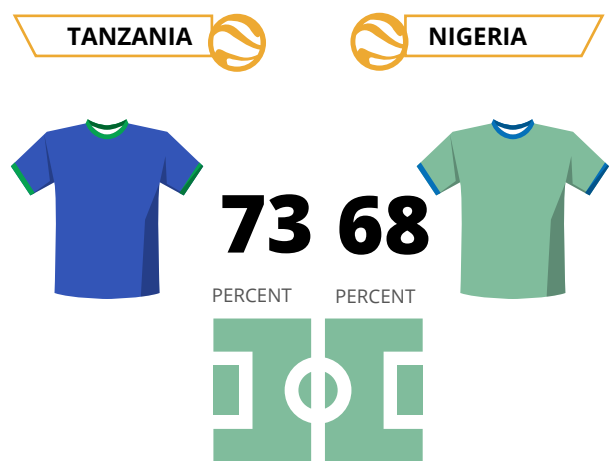


Aware of which TV channels in their respective countries will be showing the live matches

67%



Among respondents in the 6 countries, Tanzania has the highest number of respondents who are aware of the occurrence of the World Cup this year (73%), followed closely by Nigeria with 68%, Ghana at 60%. Kenya takes the last position at 55%.

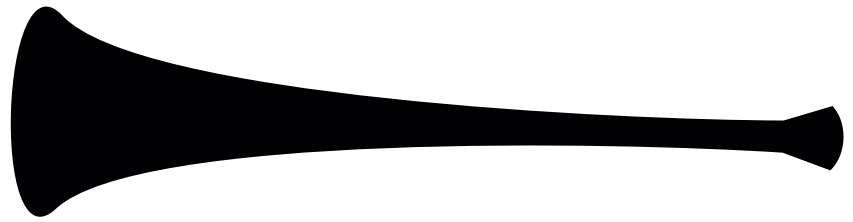


35%

Aware that there will be 5 teams from Africa and which teams those are

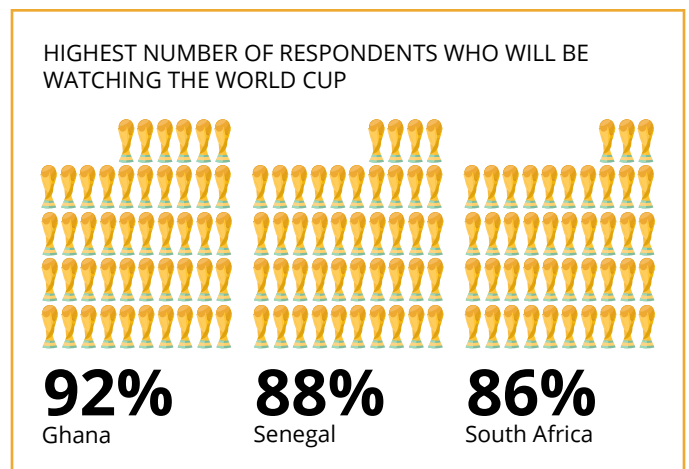
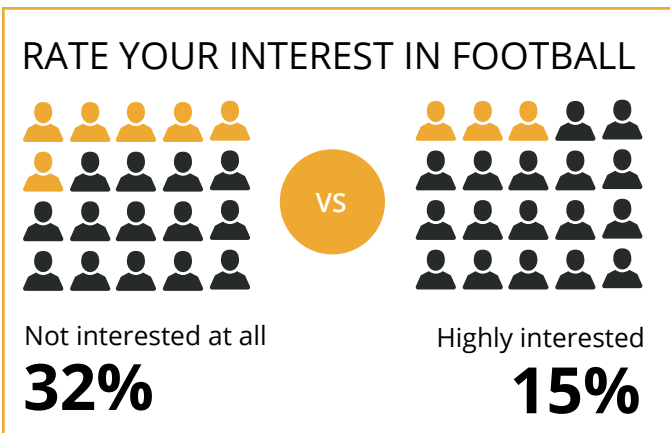


INTEREST



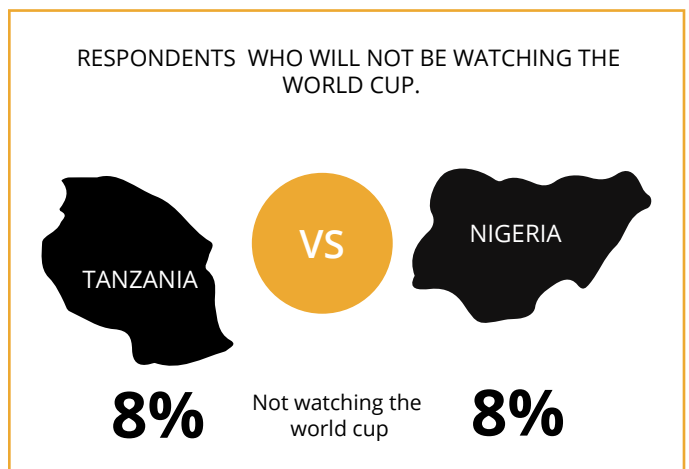
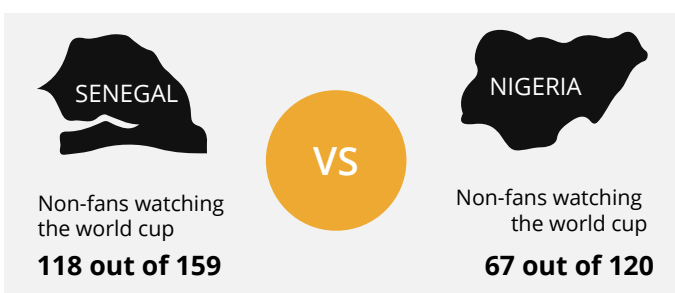
The survey further noted a high level of interest among those who do not usually watch football, especially from the countries which have qualified for the games.

The highest percentages of respondents who will be watching the World Cup come from Ghana with 92%, followed by Senegal with 88% and then South Africa with 86%.

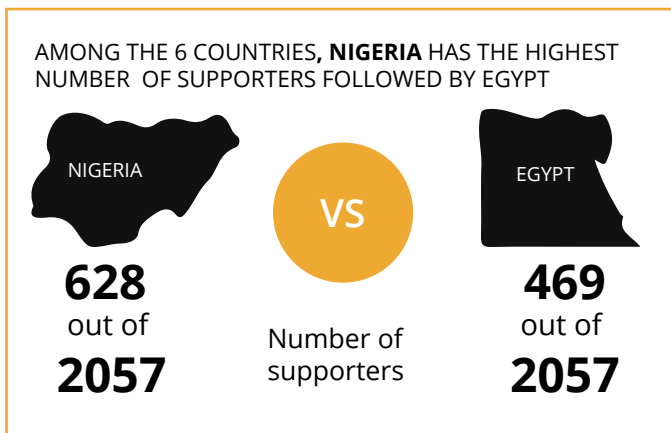


Senegal takes the lead in terms of the percentage of respondents who will be watching this year's World Cup despite not identifying as regular football fans, with 74% of those who said they will be watching saying they are not football fans. This is likely due to the fact that Senegal has not qualified for the World Cup since 2002, when the country advanced to the quarter final. In Nigeria, which has qualified for past two World Cups in addition to the 2018 games, 56% of those watching do not identify as regular football fans.

Nigeria & Tanzania have the highest number of respondents who will not be watching (8%), and Kenya has the highest percentage of respondents who are unsure about watching (12%).



There will be five African teams playing at this year's World Cup: Senegal, Egypt, Morocco, Nigeria and Tunisia. GeoPoll sought to determine the level of awareness regarding the African teams that have qualified, and found that only 39% were aware that there will be 5 teams from Africa participating in 2018 and which teams those are.



When asked how they would rate their interest in football generally in this current survey, a high percentage of respondents (54%) indicated they had no interest at all in football. Only 15% indicated that they had a very high interest in the sport. Comparing this with interest in this year's FIFA World Cup, 51% indicated lack of interest in this year's World Cup. This will likely change as the World Cup draws near and as awareness increases, as was observed in our surveys and audience measurement data in 2014.

ADVERTISING AWARENESS

In terms of advertising activity, as of April World Cup fever is yet to be felt in Africa. With the exception of Coca Cola, there has been little to no marketing about the upcoming World Cup by official sponsors operating in Africa or brands that have started brand activations and marketing strategies around the World Cup in Africa, our survey confirms.

Hisense, Coca Cola, Qatar Airways, Visa and Star Times are some of the official FIFA 2018 World Cup partners operating in the various African Markets.

OFFICIAL FIFA 2018 WORLD
CUP PARTNERS

Hisense **VISA**

Coca-Cola

QATAR **القطرية**
AIRWAYS

There is also little awareness among Africans on who the official World Cup partners are, and what other companies may be doing World Cup related brand activities or advertising.

When we asked respondents to “Name any brands or companies that are having a 2018 World Cup promotion”, a majority (36%) could not name any. A total of 31% were aware of Coca-Cola’s activities, with Kenya having the highest level of awareness of Coca Cola’s activities around the World Cup.

The lack of awareness of most of this year’s official World Cup partners in Africa may be attributed to the channels of awareness, targeting and/or the messaging. Our survey did not delve into this aspect of awareness, but it would be interesting to examine in the future.

The high level of awareness on Coca-Cola’s marketing activities around this year’s event are mostly due to the recent World Cup Trophy Tour. In February this year, Kenya was among the few African countries where Coca-Cola took the World Cup trophy as part of its 2018 FIFA World Cup Trophy Tour. The other African countries where the trophy toured were Ethiopia, Uganda, South Africa, Mozambique, Nigeria, Senegal, Cote D’Ivoire and Egypt.

Only 1% of respondents were aware that Hisense and Visa are official FIFA 2018 partners, despite these companies having a huge presence in the African market.

PREDICTIONS & FAVORITE TEAMS



There is perhaps no other global sporting event that brings nations and citizens together like the World Cup. Patriotism to country and continent among people the world over is palpable during this season every four years. In Africa, the World Cup is a time when citizens temporarily set aside their skepticism with the state of affairs in their countries and join together in celebrating their love for the game and Pan-Africanism. However, despite their enthusiasm for the game, no African team has ever won the World Cup.

Since the start of the World Cup in 1930, Brazil are not only the team that have had the most wins, taking home the trophy a total of 5 times, they have also never missed any World Cup tournament since its start. Germany and Italy have been worthy contenders with each claiming 4 trophies so far. For football fanatics, predicting the winners of the 2018 World Cup is a sport in itself. Although predicting the most likely winners is an odds game, the World Cup has been known to throw some curve balls, with favorite teams being eliminated early on and the underdogs performing better than expected.

GeoPoll sought to find out the international teams that Africans think will win, finding

that 22% expect Brazil to win this year's World Cup followed by Germany and Spain at 20% and 11% respectively.

No African soccer team has ever reached the World Cup semi-finals *according to the FIFA Milestones, facts & Figures; Statistical Kit 7 report*. For the 2018 tournament in Russia, five strong African teams could change that. As a recent *Deutsche Welle article* on 'Africa's chances at the 2018 World Cup' notes, "it's not going to be an easy feat." Along with Nigeria, who have qualified for the past World Cups, Senegal, Egypt, Morocco and Tunisia will be vying to break the duck and finally go past the quarter-finals – or go ahead and win the prized trophy.

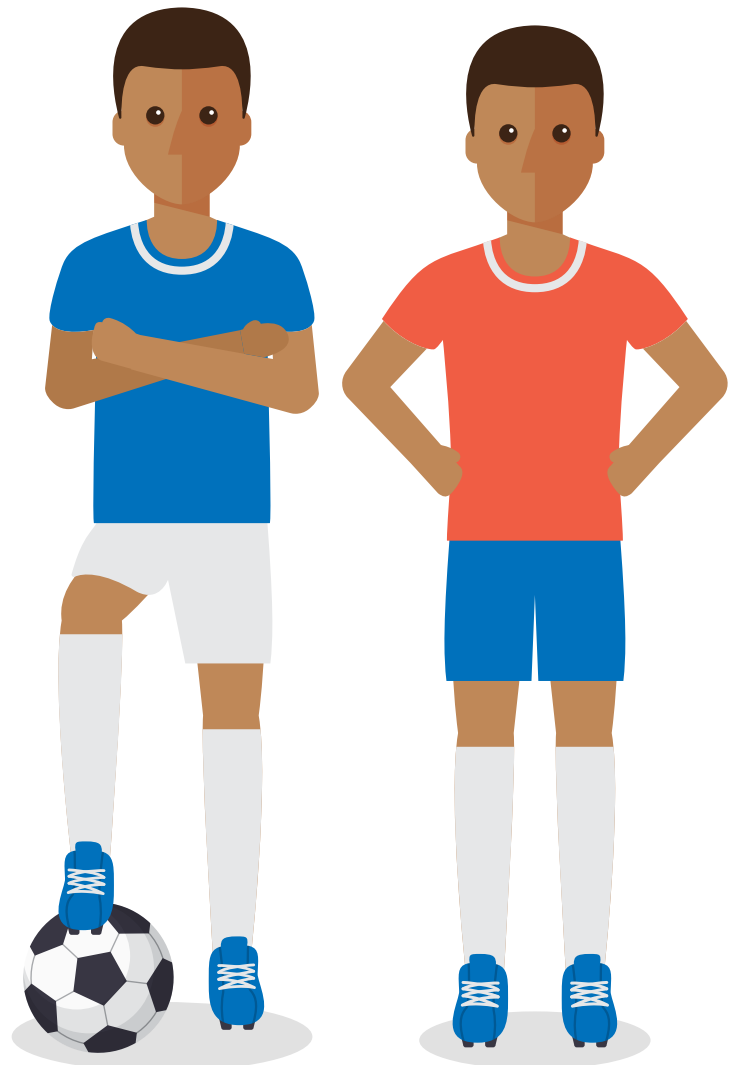
"A shift is happening in African football", notes *Sportsnet*. For the first time since 1986, there will be three teams from North Africa, a space that has been dominated by West Africa. The article also makes note of the absence of some indomitable African football team legends such as Ivory Coast, Cameroon and Ghana.

The Nigeria team, a darling for many African World Cup fans, dreams of glory this year. In our survey, 9% Africans are predicting that this West African team will beat all odds to bring the trophy home. Nigeria is the only

African country second to Cameroon that has participated in most World Cup games. This year marks the 6th time that Nigeria is qualifying for the World Cup. Cameroon, which holds a record of 7 participations failed to qualify for this year's cup.

Support of African teams by African football fans is a patriotic duty that transcends the many challenges that continue to plague this sport in the continent. Across the 6 countries where the survey ran, Nigeria has the highest number of supporters with 31%. Egypt came in second with 23%.

In a similar survey in 2014, we asked respondents from 10 African countries which teams they predicted would win the World Cup then. In 2014, African respondents thought Brazil was likely to win with 36% of respondents betting on the South American team. Germany followed in a distant 2nd at 11%, and only 7% and 8% thought Ghana and Nigeria would win, respectively.



VIEWING HABITS

World Cup football is the most widely viewed sporting event globally. The 2014 FIFA World Cup reached a global in-home television audience of 3.2 billion viewers (46.4% of the world). More than one billion fans tuned in to watch the final of the 2014 FIFA World Cup Brazil. In Africa, GeoPoll found that 25 million adults

from five nations watched the Nigeria vs Iran game, making it the most-watched game by Africans. For football fans in Africa, normal life comes to a standstill during World Cup season. For many, it will be a time to become football experts as they socialize, drink and support local teams through branded merchandise.

WHERE WILL YOU **MOSTLY** BE WATCHING THE 2018 WORLD CUP?

HOME



OUTDOORS



FRIEND'S PLACE



OFFICE



RESTAURANT / CLUB



NOT SURE YET

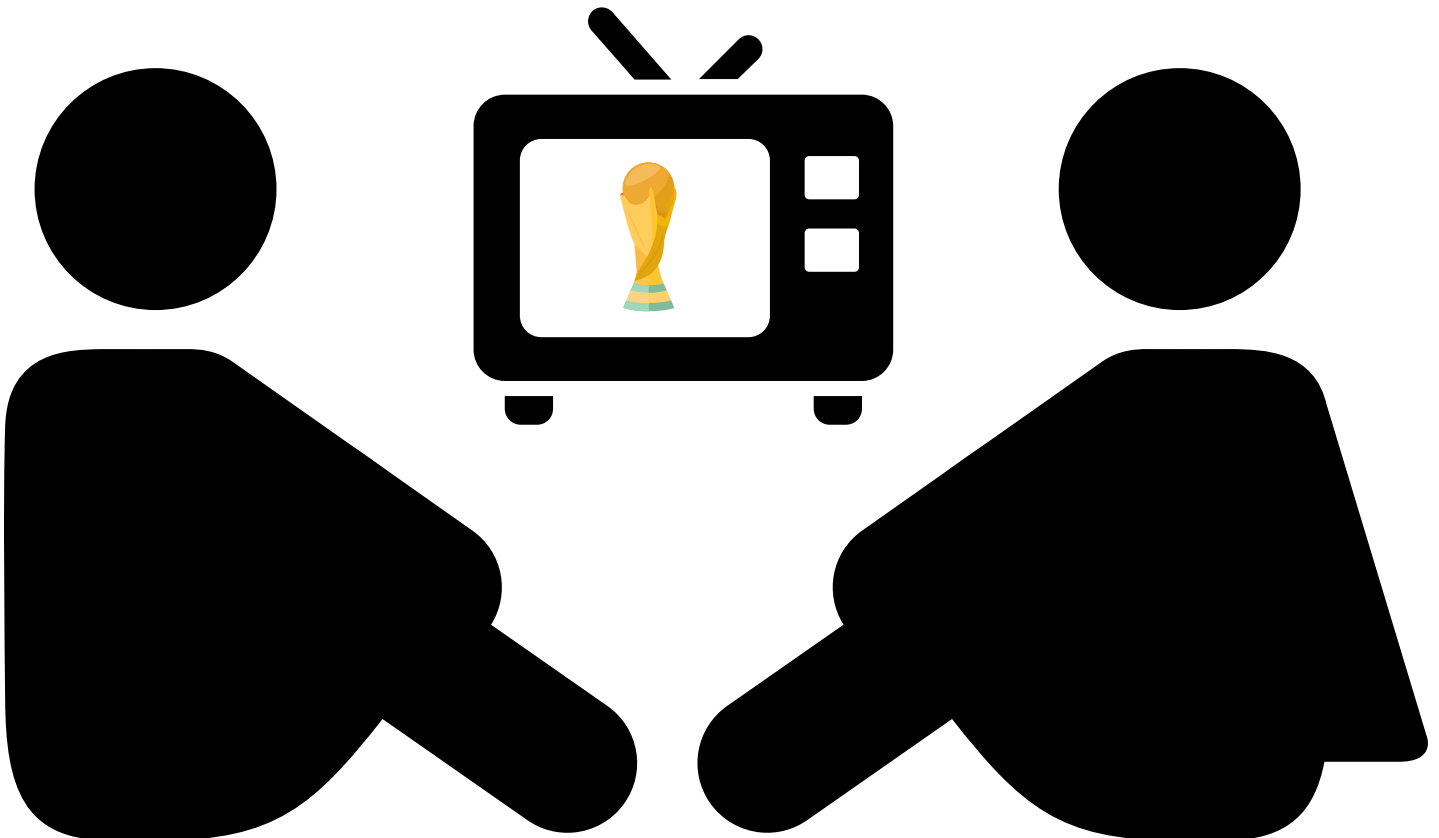
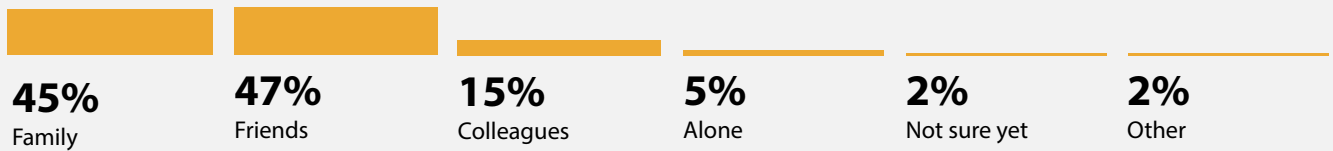


But where will most fans be watching the games from? For advertisers and brands looking to capitalize on the World Cup season, it's important to understand the viewing habits of Africans around the tournament.

There is however, a significant number who will go to their favorite club/restaurant or a friend's home. As to who will be the best company to watch with, many are planning to watch the games with friends, family and colleagues in that order.

GeoPoll's survey finds that for a majority, home is the best place to catch the action with friends.

WHO DO YOU PLAN TO WATCH THE WORLD CUP GAMES WITH?



GENDER TRENDS

Football has always been viewed as a male dominated sport. Our 2014 surveys confirmed that more males were watching the games than females. Across all games and countries through the round of 16, the gender split was 67% male to 33% female. Female viewership did not exceed a total of 10.5 million across all 5 countries where GeoPoll was collecting audience measurement data, and no games had more female than male viewers.

There were however some interesting patterns when examining what games females were most likely to watch. While males consistently tuned in to games, females tuned in most to games involving African teams. The four games with the highest female viewership numbers all involved African teams, and the highest female viewed game was Germany-Ghana, which drew 14.3 million males and 10.3 million females.

Findings from our recent survey found that majority of both male and female respondents across all the 6 countries are aware of the occurrence of the World Cup this year. Across all the 6 countries, there is no significant difference between the male and female respondents who will be watching World Cup matches. However, Senegal has the highest number of female respondents of ages 15 to 24 who will be watching the World Cup compared to the other age

groups. The age group 35+ has the least number of respondents who will watch the World Cup across both genders.

When we did a comparison of the support for African teams based on gender, we found that Nigeria has the highest number of supporters across both genders compared to other African teams. When it come to the gender split, a majority (31%) of males said they will be supporting this team against other African teams. The biggest support among females was also towards Nigeria at 29%.

The majority of female respondents will prefer watching the World Cup from home (72%) followed by friends' place (11%). Male respondents had somewhat similar viewing preferences, although a higher percentage report planning to go to a friend's house or club to watch: Sixty percent of males will prefer watching the World Cup from home (60%), followed by a friends' place (12%) then closely followed by a restaurant or club at 10%.

CONCLUSION

We have found that there is generally a high level of interest in the 2018 World Cup despite low participation from African countries. Most World Cup fans will be still be rooting for West Africa teams despite North Africa having more qualifying teams this year round.

Viewing of the games will still very much be a social affair with those willing to watch spending more time with friends and family at their homes. It will be a time for Africans families to bond as they cheer their teams on. There is a need for discerning brands to get their name out there to this captive audience that will live and breathe football for one month – pre and post-event.

Over \$1.5 billion was spent on advertising globally, with television representing the largest share of these ad dollars.

The 2018 World Cup is expected to be even bigger for advertisers, brands, and media houses alike. Given the competitiveness surrounding World Cup advertising and related marketing activities, it is crucial that you are reaching the right audiences, proving ROI of investments, and using the most effective messaging possible. Strategic plans informed by timely, reliable data insights will ensure that you reach the right audience, prove ROI of your investments, and immediately respond to changes in brand health.

GeoPoll is pleased to offer expanded data insights which will allow brands, media

owners, and agencies to better target advertisements and measure ROI. Offerings include the following services, available before, during, and after matches.

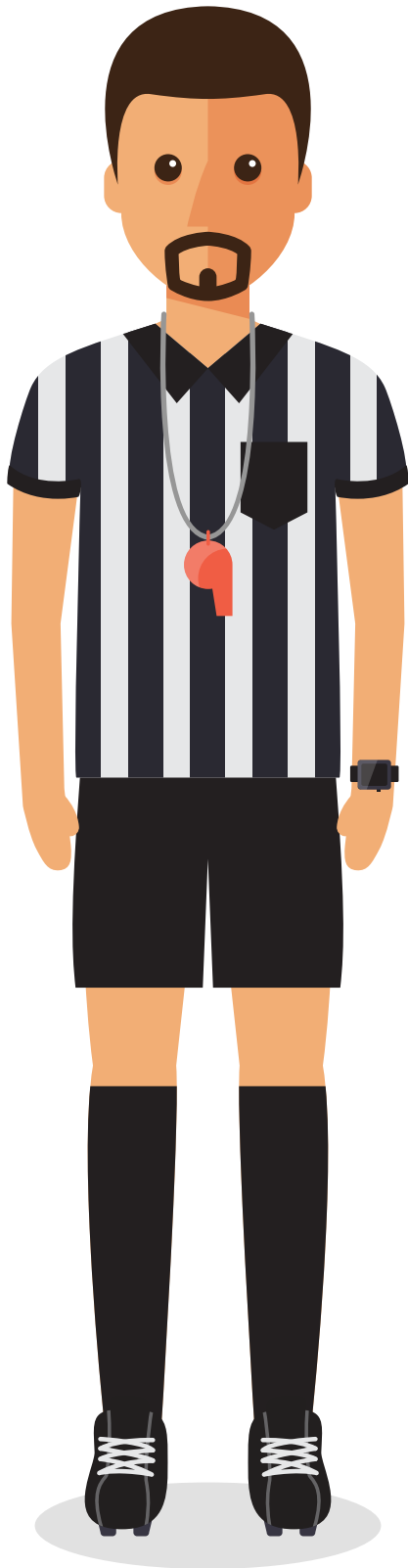
CUSTOM RESEARCH:

Conduct remote, mobile surveys that are nationally representative or targeted to your specific audience by demographics or specific screening questions.

DAILY AUDIENCE MEASUREMENT:

GeoPoll's audience measurement service, developed with Kantar Media, provides daily audience data for TV, radio, and print in 10 nations in Africa and the Middle East.

SURVEY METHODOLOGY



This data was collected by GeoPoll, a leading mobile survey platform which facilitates mobile data collection in over 60 countries. Responses were gathered via mobile web, mobile app and text message (SMS) from a total of 2,400 unique respondents in a span of three days. The sample consisted of 400 respondents from each of the sampled countries namely: Kenya, Nigeria, Tanzania, South Africa, Senegal and Ghana. The panel gender split was 37% female and 63% male. The age distribution was: 15-24 made up 50% of respondents, 25-34 year olds made up 39% of respondents and 12% were those aged above 35 years old. The sample was split between urban and rural respondents, with 31% of respondents from rural areas and 70% of the sample located in urban areas.

The survey consisted of eighteen questions which included open ended, multiple choice and range questions designed by GeoPoll. The data was collected, compiled and analyzed by GeoPoll's data analysts.

ABOUT GEO POLL

Since 2012, GeoPoll has been a leader in providing fast, high quality market research from areas that are difficult to access using traditional methods. Working with clients including leading brands, agencies, media houses, and international development groups, GeoPoll facilitates projects that measure ROI of TV advertisements, demonstrate demand for new products, and assess food security around the world.



CONTACT INFORMATION

To conduct your own study with GeoPoll or subscribe to our daily Audience Measurement Service during the World Cup, please contact us here:

www.GeoPoll.com/contact-us

For press inquiries, please contact;

Njeri Wangari

njeri@geopoll.com / +254 722 353 657 / 0788 11 00 56

